



SPRING CONFERENCE

Kansas City, Missouri

2003

Queries: How To Get Started

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To Get The Most From The ISIR Analysis Tool You Need A Good Working Knowledge Of:

- **Queries**
- Reports
- Data
Analysis

What Is A Query?

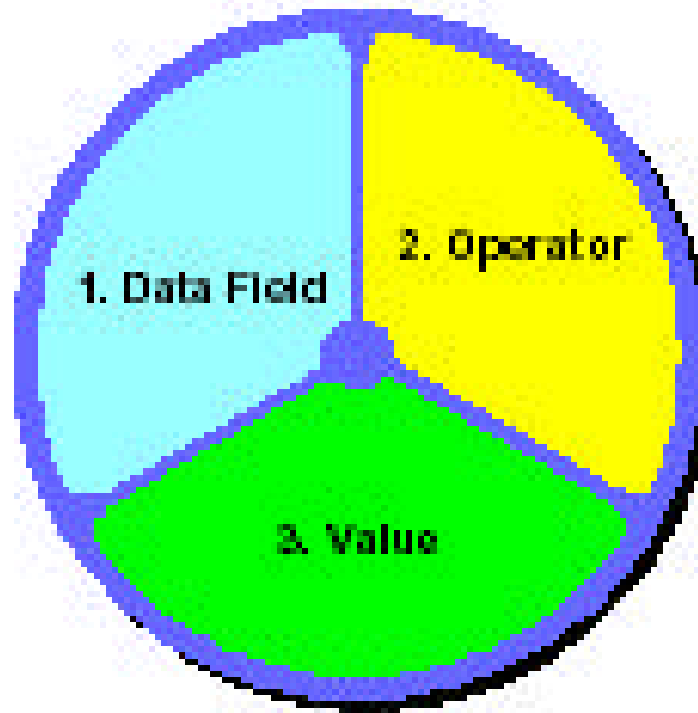
- A request for records.
- A request to retrieve data.

Getting What You Want

- A query will select the students you want to study. The report you choose, in combination with the query, will give you the information you want to study.

Query + Report = Data You Want To Study

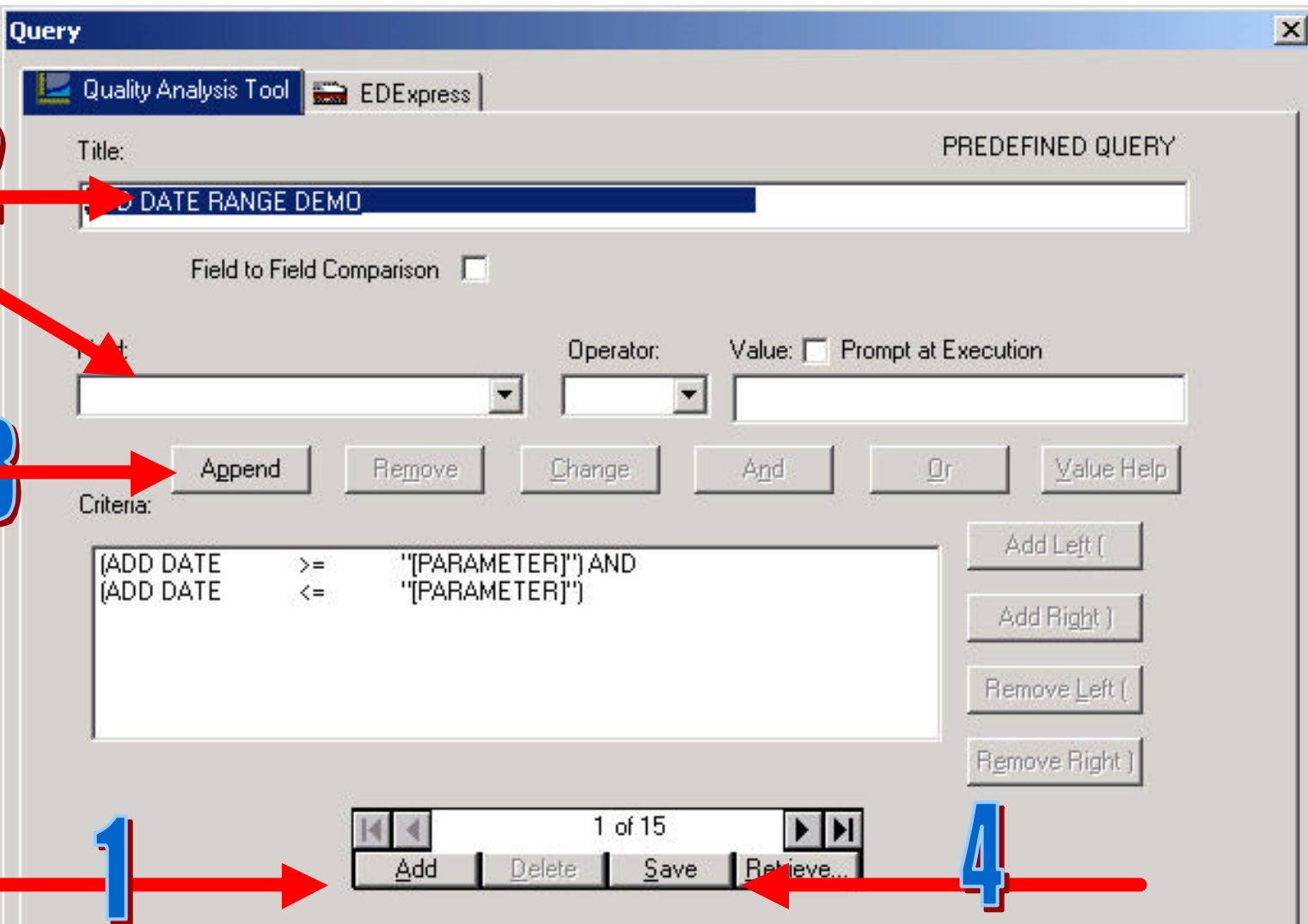
Query Components



Processing Steps

- **Add**
- **Enter Data**
- **Append**
- **Save**

Query Menu Box



The screenshot shows the "Query" dialog box in the "Quality Analysis Tool" window of "EDE Express". The dialog has a title bar, a "Title:" field containing "DATE RANGE DEMO", a "Field to Field Comparison" checkbox, and a "Criteria:" section. The "Criteria:" section contains a list of criteria: "(ADD DATE >= '[PARAMETER]') AND (ADD DATE <= '[PARAMETER]')". To the right of the criteria list are buttons for "Add Left (", "Add Right)", "Remove Left (", and "Remove Right)". At the bottom of the dialog are buttons for "Add", "Delete", "Save", and "Retrieve...".

Numbered callouts indicate the following elements:

- 1**: Points to the "Add" button at the bottom left.
- 2**: Points to the "Title:" field.
- 3**: Points to the "Criteria:" section.
- 4**: Points to the "Retrieve..." button at the bottom right.

Query Components

- **Data Field** → ■ Parent's Adjusted Gross Income
- **Operator** → ■ \leq
- **Value** → ■ 30000

Queries & Reports

- Queries select specific student records
- Reports display data you want to see for the records selected

Reports


Changes to ISIR Fields	F/k/a	Field Change Report
Changes to ISIR Fields and Pell Eligibility	F/k/a	Corrected Records in Initial EFC Range
ISIR Changes by Field Increment	F/k/a	Field Range Report with Corrected Field Counts
ISIR Changes by Field Increment and Pell Eligibility	F/k/a	Pell Corrected Records Report
List-EFC Change by Student	F/k/a	Student Listing of EFC Change Report

Reports

List – Verification Flags by Student	No Name Change
List - Verification Selection Criteria by Student	No Name Change
List - Verification Selection Criteria by Code	No Name Change
Transaction Comparison Report	No Name Change
Custom Report	No Name Change

Using A Query

Print [X]

 **Quality Analysis Tool**

Report

Transaction Comparison [v] ☐ Single ☒ Multiple

Report File Destination

☐ Printer ☐ File ☒ Screen

File... []

Options

Field Order: Sequence Number [v]

Sort Order: SSN [v]

Selected Fields Code: [] ...

Discrepancy Field: [] ...

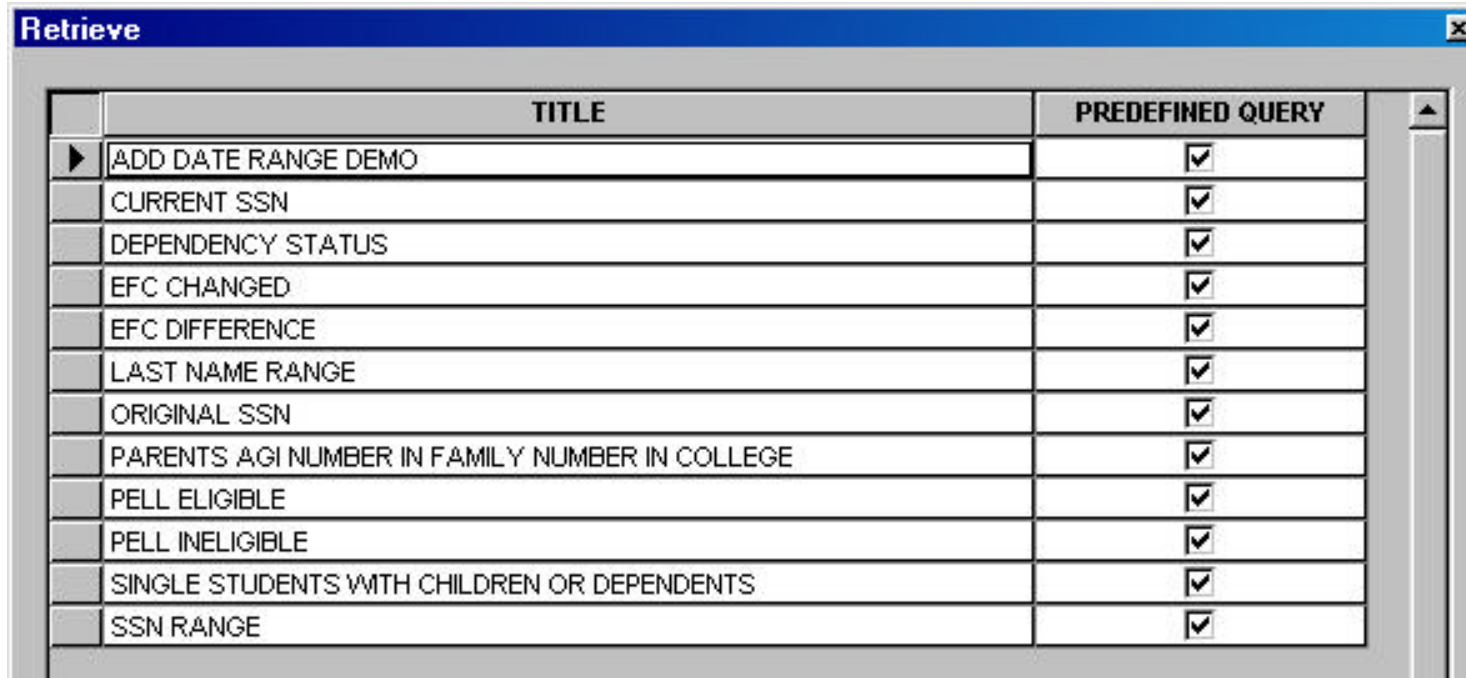
Changed Fields Only? ☐

Selection Criteria **OK** **Cancel** **Help** **Print Setup**



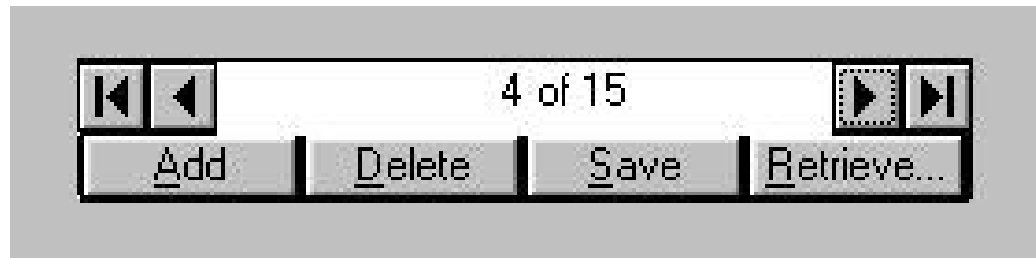
Pre-Defined Queries

- The ISIR Analysis Tool comes with 12 predefined queries.



	TITLE	PREDEFINED QUERY
▶	ADD DATE RANGE DEMO	<input checked="" type="checkbox"/>
	CURRENT SSN	<input checked="" type="checkbox"/>
	DEPENDENCY STATUS	<input checked="" type="checkbox"/>
	EFC CHANGED	<input checked="" type="checkbox"/>
	EFC DIFFERENCE	<input checked="" type="checkbox"/>
	LAST NAME RANGE	<input checked="" type="checkbox"/>
	ORIGINAL SSN	<input checked="" type="checkbox"/>
	PARENTS AGI NUMBER IN FAMILY NUMBER IN COLLEGE	<input checked="" type="checkbox"/>
	PELL ELIGIBLE	<input checked="" type="checkbox"/>
	PELL INELIGIBLE	<input checked="" type="checkbox"/>
	SINGLE STUDENTS WITH CHILDREN OR DEPENDENTS	<input checked="" type="checkbox"/>
	SSN RANGE	<input checked="" type="checkbox"/>

Where To Find The Predefined Queries



Complex Queries

What Is a Complex Query?

A complex query is formed by linking two or more simple queries together and using an AND or an OR connector. Complex queries provide you with a powerful tool for working with your ISIR Analysis Tool database.

Complex Query Example

```
(PARENTS' ADJUSTED GROSS INCOME      >=      [PARAMETER]) AND  
(PARENTS' ADJUSTED GROSS INCOME      <=      [PARAMETER]) AND  
(PARENTS' NUMBER OF FAMILY MEMBERS    >=      "[PARAMETER]") AND  
(PARENTS' NUMBER IN COLLEGE           >=      "[PARAMETER]")
```

Field to Field Comparison

- Compares numeric fields within one record.
 - If a student has two ISIR transactions, a field to field query compares the numeric fields in the 01 transaction only with the other numeric fields in the 01, not with numeric fields in the 02.
- This option is not available if you marked Prompt at Execution or Current Date.

Field To Field Comparison

Query

Quality Analysis Tool | EDEExpress

Title:
PARENTS TAXES PAID EQUALS 10 PERCENT OF AGI

Field to Field Comparison ☒ Field to Compare to: PARENTS' ADJUSTED GROSS INCOME Add

Field: PARENTS' U.S. INCOME TAX PAID Operator: Value: ☐ Prompt at Execution
*10bl_E_Parent.PARAGI

Append Remove Change And Or Value Help

Criteria:
(PARENTS' U.S. INCOME TAX PAID - *10bl_E_Parent.PARAGI)

Add Left (Add Right (Remove Left (Remove Right (

Using the MOD Operator

- The MOD (Modulus) operator divides *number1* by *number2* (rounding floating-point numbers to integers) and returns only the remainder as *result*. For example, in the following expression, A (which is *result*) equals 5.

$$A = 19 \text{ MOD } 6.7$$

Using the MOD Operator

- If you wanted to identify records whose Student's AGI was a multiple of 1000, the following Field to Field query could be built:

(STUDENT'S ADJUSTED GROSS
INCOME MOD 1000 = 0)
AND(STUDENT'S ADJUSTED GROSS
INCOME >= 1000)

A Challenge!!!

- How could you recreate the following verification procedure using a Field to Field Comparison Query?

Students income earned from work +
spouse's income earned from work >
student's adjusted gross income + 5000

Answer!!!

- Do some simple algebra to create a new, equivalent query statement:

Student's adjusted gross income <
(Students income earned from work +
spouse's income earned from work) -
5000

Modifying A Query

Step	Action
1	Select Tools – Query from the menu bar. The query Dialog box displays.
2	Use the arrow buttons in the database buttons box to locate the query you want to modify.
3	<p>Modify the query. Click any line to select it and change the Field, Operator, or Value. Then click the Change button.</p> <ul style="list-style-type: none"> -You can also delete lines or add new lines to the query. -To add new lines, select the line that should appear after the <i>new</i> line. Specify the Field, Operator, and Value for the new line, then click Append. -Use the other buttons located around the Criteria box to fine-tune the query statement if necessary.
4	To delete a line, select the line and click Remove
5	Click Save to save the query, then Click OK .
6	Click OK to close the Query dialog box or click Add to create another query.

Deleting A Query

To delete a query:

1. Select **Tools, Query** from the ISIR Analysis Tool menu bar. Use the arrow buttons in the database buttons box to locate the query you want to delete. You cannot delete predefined queries.
2. Click the **Delete** button in the database buttons box. ISIR Analysis Tool asks you to confirm that you want to delete the query.
3. Click **Yes** to delete the query.
4. Click **OK** to continue.

To Query Or Not To Query

**Is it always necessary
to construct
a Query to
select a subset
of students to study?**



NO!



Close

9:55 AM

Setting up the Verification Profile

- At the ISIR Analysis Tool Main Menu, select **TOOLS**, then **SETUP**, then **Verification Edit Profiles**.
- If the ADD button is grayed, just start entering your **Code, Title and select your query**. Then click **SAVE**.
- If the ADD button is not grayed, click **ADD**, enter Title, **select query and SAVE**.
- Click **OK**.
- See next slide.



SPRINT

2002 - 2003 Quality Analysis Tool for Windows

File View Process Tools Help



Utilities

Setup

Custom Formats

Query...

System...

Verification Edit Profile...

File Management...

User Database...

Security Users...

Verification Selection setup...

C:\PROGRAM FILES\EDSUITE\QUALITY ANALYSIS TOOL 2002-2003\qat23_new.mdb

NUM

Start



Inbox - Microsoft Outlook

Query Presentation

2002 - 2003 Quality A...



3:34 PM

Verification Edit Profile

Code:

VER001

Description:

DEPENDENT STDS PARENTS AGI <= 0

	Select	Query Title	Sequence
1	<input type="checkbox"/>	EFC CHANGED	
2	<input type="checkbox"/>	PELL ELIGIBLE	
3	<input type="checkbox"/>	PELL INELIGIBLE	
4	<input type="checkbox"/>	SINGLE STUDENTS WITH CHILDREN OR DEPENDENTS	
5	<input type="checkbox"/>	PARENTS AGI EQUAL OR GREATER 30000	
6	<input type="checkbox"/>	PARENTS AGI EQUAL OR LESS THAN 30000	
7	<input type="checkbox"/>	STUDENT WORKSHEET A AND EFC	
8	<input checked="" type="checkbox"/>	DEPENDENT STDS PARENTS AGI LESS THAN EQUAL TO 0	1
9	<input type="checkbox"/>	DEPEN NON RESIDENT PARENTS TAX PD GREATER 25 PERCE	

Deselect

Select All

Deselect All

Resequence

1 of 1

OK

Cancel

Help

- To verify that you now have one Verification Profile entered, go to PROCESS, then VERIFICATION SELECTION

Select Verification Edit Profiles

Set Initial School Verification Flag? ☐

	Selected	Code	Description
1	<input type="checkbox"/>	VER001	DEPENDENT STDS PARENTS AGI <= 0

OK Cancel Select Select All Deselect All Help

Need Help

- **On-Line Help**
- **Desk Reference**
- **Website – Appendices: How To Construct Queries**
- **CPS/WAN Technical Support**
»800-330-5947

More Help

- Contact Us

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Regions 8, 9, 10

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Spring Conference Sessions

- **Session 22** – Tools for Schools
- **Session 23** – Using the ISIR Analysis Tool to Answer Your Institutional Verification Questions
- **Session 24** – Take the ISIR Analysis Tool for a Test Drive

Questions